

CIT Feasibility Workflow

ORGANIZATIONAL DASHBOARD



Introductions, overview of sessions. goal setting and expectations

COMMUNITY MAPPING



Community asset map, discussion of identified neighborhoods/areas of interest

PROPERTY EVALUATION



Property Evaluation Matrix, characteristics of potential properties





Overview of financial pro forma, operating costs, letter of credit, calculation of dividend and share price

EDUCATION



Attend Owing to Owning Online classes, or review class set-up, curriculum, best practices

LEGAL COACHING



Legal components of the East Portland CIT, legal feasibility of replicator ideas

CAPITALIZATION STRATEGY



Strategies and recommendations for CIT Capitalization

OPERATIONS



Staff roles, costs, and details of ongoing CIT operations

DMERL STRATEGY



Design, monitering, evaluation, research, and learning strategy for CIT property zip codes

ORGANIZATIONAL ASSESSMENT



Summary of feasibility and steps moving forward



- (?) Complete Readiness Survey
- Sign non-disclosure agreement
- 🗸 Complete team skills grid
- Read Kick-Off prep documents
- (?) Complete Community Mapping Questionnaire
- Identify areas/neighborhoods of interest
 - Read Community Mapping Prep Documents
 - (?) Complete Property Evaluation Questionnaire
- Identify potential community partners in neighborhoods of interest
 - Read Property Evaluation prep documents
 - Identify potential properties within neighborhoods of interest
 - Run potential properties through the **Property Evaluation Tool**
 - Review Financial Pro Forma Guide
 - ? **Complete Class Implementation**
 - Ouestionnaire Enter top potential properties data in financial pro forma, run financial
 - Review class Proprestive Interior guides
- Arrange meeting with legal consultants
 - --> note questions to explore in session 8
- Identify potential class implementation partners/other financial literacy classes in neighborhoods of interest
 - Review CIT legal documents
- Complete capitalization questionnaire
- Solidify strategy for establishing LC or other investor protection
 - Complete operations questionnaire
 - Review CIT Operations Guides
- Complete operations budget projection and implementation plan
- Clarify capitalization strategy and capital objectives based on pro forma and operations budget
- (?)Complete final questionnaire and feasibility evaluation

